AI rules for your team

What can go into AI tools at work, and what stays out. Read it, keep it, ask when you're not sure.

Dean Ahlgren

Business: _____ Date: _____

AI accounts we use for work: _____ Ask this person when you're not sure: _____

WHICH ACCOUNTS

- Use only the AI accounts listed above for work. Don't use your personal account for business information.
- The person who manages each account checks its data settings, and turns off use of our information for training the AI where the provider allows it.
- If a new AI tool or app wants access to our email, files or calendar, ask first.

FINE TO PUT IN

- Information that's already public: our website, published prices, hours, menus and product details.
- Your own drafts of emails, posts and notes, with customer names and private details taken out.
- Made-up or blanked-out examples when you're practicing.
- General questions about how to do something.

KEEP OUT

- Passwords, door and alarm codes, account numbers, card numbers and Social Security numbers.
- Personal details about customers, tenants, patients or guests, unless the owner has approved that account for it.
- Health, legal or money matters about anyone.
- Staff records: pay, reviews, discipline and medical notes.
- Anything a client, contract or agreement says is confidential.

BEFORE ANYTHING GOES OUT

- Read every AI draft before you send, post or save it. AI can sound sure and still be wrong.
- Check facts, prices, names, dates, addresses and anything that promises something for the business.
- You are responsible for what you send, not the tool.
- Contracts, legal letters, health information and tax or money questions get a look from the owner, or the right professional, before they go out.

When in doubt, leave it out and ask. If something went in that shouldn't have, tell the person named above the same day so it can be dealt with. Asking first is always fine.